

USAWC STRATEGY RESEARCH PROJECT

**THE UNITED STATES MARINE CORPS AND SPECIAL OPERATIONS: A NINETEEN
YEAR CONVERGENCE TOWARD A MARINE COMPONENT**

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ABSTRACT

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Since its creation in 1987, the U.S. Special Operations Command (USSOCOM) and the U.S. Marine Corps (USMC) have maintained a professional, yet consciously separate, coexistence. Over the past nineteen years, amid much debate, the two cultures have worked their way toward each other. At times this evolutionary process was propelled forward by such world events as globalization, dissolution of the Soviet Union, Desert Storm, 9/11, Operations Enduring Freedom and Iraqi Freedom, and the Global War on Terrorism (GWOT). Likewise, the nation's security strategies continuously reset priorities, thereby fluctuating the Department of Defense's (DoD) emphasis on developing joint capabilities. In response to these influences, the USMC and USSOCOM embarked on a program to examine a number of joint initiatives to explore better operational and tactical integration. These initiatives included Flag Officer Boards, joint exercises, staff liaisons, billet exchanges, and ultimately the joint execution of missions. On 1 November 2005, the creation of the Marine Special Operations Command (MARSOC) finally ended the process. Would the Marine Corps' and the Special Operations Command's previous tenuous relationship have endured indefinitely without the direct intervention of Secretary of Defense, Donald H. Rumsfeld?

THE U.S. MARINE CORPS AND SPECIAL OPERATIONS: A NINETEEN YEAR CONVERGENCE TOWARD A MARINE COMPONENT COMMAND

"It may have taken a while to get the Marines and the special operations together. And it did," Defense Secretary Donald Rumsfeld said on 24 February 2006, drawing laughter from the crowd gathered for the Activation ceremony of the Marine Corps Special Operations Command. "I'm delighted to see it."¹ The Secretary's "a while" referred to a span of nineteen years leading to the two organizations' merger that began with USSOCOM's Tampa ceremony of June 1987 and the February MARSOC ceremony at Camp Lejeune, NC. During those two decades significant world events impacted on our nation and set in motion a transformation of the Department of Defense that continues today.

So how did the two organizations start their affiliation? To understand the significance of the change and the reasons events unfolded as they did, it is important to review the relevance of some significant events in the context of the times. Would world events bring the two organizations to the inescapable conclusion that a lasting, formal relationship was required or would it take the direct intervention of the Secretary of Defense to get Marines assigned under USSOCOM's command? By the end of this retrospective analysis, it will become clear that all actors made the best decisions they could, given their ability to balance the current realities and their visions of the future. The time-honored Marine Corps was forced to make adjustments along the way much in the same way the fledgling U.S. Special Operations Command had to carve out its place in the world. In tracing the evolution of the Marine and special operations' relationship, one could go all the way back to the birth of our nation. But, the story really starts in the post Vietnam era amidst a complicated political landscape. During the course of the war, U.S. forces achieved some important successes; however, these were overshadowed by the increasingly hostile mood of the nation toward the government and the war in general. Despite gains made on the military front, American troops were withdrawn and the eventual fall of Saigon was the last bitter pill the nation had to swallow; this national trauma did little to improve the attitude of the nation's leaders toward the Defense Department. The generally negative tone in post-Vietnam Washington had a profoundly negative effect on subsequent military readiness.

Post Vietnam Era – 1970-1980 (Atmospherics)

Discord among the Services' conventional and special operating forces was in large part attributable to the conduct of the Vietnam War. The largely unconventional conflict in Vietnam led to a proliferation of elite units for which the predominantly conventional commanders were

responsible and attempted to control. By the war's end, there was a certain amount of animosity between the two cultures. After the conflict, as is historically the case, all military services and supporting components were sharply reduced. A characteristic of this post-war drawdown was some vilification of the nation's armed forces by segments of the public and certain national leaders. The special forces received particular attention. These attitudes were vocalized by activist anti-war groups fueled by personal beliefs and stories of rogue units and war atrocities. Generally speaking, there seemed to be a national need to find reasons why we lost the war "at the hands of what Henry Kissinger once described as a 'fourth rate' power."² As the nation tried to move past the ignoble ending to its Asian involvement, the Army regrouped and once again concentrated on the conventional warfare planned to defeat the Soviet threat in Europe. What failed to be understood and planned for was that the post-World War II instabilities suppressed by the superpowers still lurked worldwide.³

The intelligence and special forces communities were further reduced under the Ford and Carter administrations." By 1979, the special forces were at 60% of their end strength at the close of the Vietnam War."⁴ The surviving SOF elements maintained little continuity in leadership, command and control mechanisms, tactics, techniques, and procedures, or interoperability. Additionally, their lack of representation at the senior DoD levels often resulted in SOF "misemployment."⁵ As a result, the military had neither the capability nor the personnel to execute the "complex, joint-services rescue operation, Operation Eagle Claw."⁶

1980-1985 National Missteps and Missed Opportunities

In a fairly short time the nation was faced with some high profile regional conflicts. Tasked with planning and executing the appropriate responses, the Department of Defense took action. As the following examples show, the conduct of these operations were viewed as less than successful by Congress, which became increasingly convinced the military's readiness and ability to meet the unfolding challenges were entirely inadequate. As a result, Congress became increasingly involved in DoD affairs. Its involvement culminated in passage of some landmark legislation.

The first diplomatic crisis came with the loss of an important ally when the Shah of Iran's regime fell in 1979. Later that year, the Carter administration was confronted with a hostage situation when Iranian revolutionaries held 53 hostages in the U.S. embassy in Tehran. The subsequent rescue attempt, Operation Eagle Claw, was closely supervised by Secretary of Defense Harold Brown; however, the hastily assembled rescue force consisting of special forces and conventional maritime forces, was unable to successfully execute the mission. In a

highly publicized operation, eight U.S. servicemen died at Desert One and major military equipment and sensitive intelligence were lost. The overall mission was considered an intelligence and planning debacle.

Another external agent of change came following the Soviet invasion of Afghanistan in December 1979. Defense Secretary Brown, in an effort to be better prepared for these types of contingency operations, “activated the Rapid Deployment Joint Task Force (RDJTF) at MacDill Air Force Base, Florida, on 1 March 1980. Although normally a planning headquarters without operational units, the RDJTF could obtain such forces from the several services and command them in crisis situations. Brown explained that the RDJTF was responsible for developing plans for contingency operations, particularly in Southwest Asia, and maintaining adequate capabilities and readiness for such missions.”⁷ The RDJTF was the predecessor to U.S. Central Command and former Marine Corps Commandant General P.X. Kelley was its founding Commander.

Another DoD initiative came with the appointment of former Chief of Naval Operations (CNO), Admiral James L. Holloway, as chair of an investigative panel to appraise the Desert One tragedy and identify the changes needed to make the country’s special operations capabilities more integrated, cohesive, and effective. The Holloway Commission Report cited that the ad hoc composition of the force, i.e., special operations combined with conventional units, led to shortfalls in the overall command and control structure since there was no clearly identifiable chain of command for the operation. The report also identified inadequacies in joint special operations planning and training.⁸ The Holloway Commission’s findings prompted the Defense Department to create a counterterrorist joint task force (CTJTF) and the Special Operations Advisory Panel.⁹ “The CTJTF would be directed by the National Command Authority (NCA) through the Joint Chief of Staff. It would have the authority to plan, train for, and conduct operations to fight terrorist activities directed against U.S. interests, citizens, and property outside the United States, providing the NCA a dedicated military capability to combat terrorist activities against the U.S. and its allies.”¹⁰

1983 witnessed further global unrest. In Lebanon, U.S. forces were participating in the second round of multi-national force operations when they suffered two terrorist attacks. The first killed 17 U.S. citizens at the Beirut embassy and the second attack in October killed 241 Marines billeted at the Beirut airport.

Meanwhile, the current government in Grenada was under scrutiny as Soviet and Cuban influence there increased. When Grenada was overthrown by Marxist radicals, neighboring nations pushed for U.S. intervention. Justifying action on the danger presented to the 600 U.S.

medical students studying there, the U.S. invaded Grenada with a force that eventually numbered 6,000. While there were many operations occurring all over the island, failure of the SEALs to accomplish their main missions caught the public eye. In one such episode, the SEALs assigned to rescue Governor Paul Scoon and his family ended up being likewise hemmed in at the Governor's mansion until the Marines arrived a day later to extract them. Given the number of forces committed to Urgent Fury and the level of resistance predicted, the mission was considered another national embarrassment. The mission incurred more casualties and took longer than was anticipated. Once again interoperability issues between the conventional and special forces and between the different services' special forces were highlighted.

As a result of these events, Congress refocused its attention on countering the growing threat of regional instability and the high probability of low-intensity conflict. Their concern over the lack of proficiency in planning and performing joint operations was again approaching the threshold of Congressional action. To appease Congress and to address the joint interoperability issue among the special forces communities, Secretary of Defense Weinberger tasked the services with developing special operations competencies capable of responding to future acts of terrorism and low-intensity conflict.

For his part, Marine Commandant General P. X. Kelly "directed the Commanding General, Fleet Marine Force Atlantic, Lieutenant General Al Gray, to develop a plan to increase the special operations capabilities of the Marine Corps. General Kelly's guidance and precept in the development of this plan was that new units would not be created within the Marine Corps and that the Marine Corps' capabilities must remain maritime in nature."¹¹

Marine Major General Conway, an action officer within the Office of the Secretary of Defense (OSD) at the time, offered the following excerpt from the memo directing the services to "revitalize" their special operations forces:

A significant shift in thinking was dramatized by the foresight of then (1983) Deputy Secretary of Defense William H. Taft IV, when he stated that: "U.S. national security requires the maintenance of Special Operations Forces (SOF) capable of conducting the full range of special operations on a world wide basis, and the revitalization of these forces must be pursued as a matter of national urgency."¹²

The memo also stated that there should be "*no duplication of capabilities amongst the services*," a phrase the Marine Corps claimed justified their contention that there really wasn't much they could offer SOCOM. In fact, many Marines at that time genuinely believed they were as good as, and perhaps better than, the special forces in performing certain missions. MajGen Conway

stated this confidence was probably a contributing factor for determining that the Marine Expeditionary Units (MEU) forces were declared special operations capable (SOC).

In June 1983, appalled by the high profile failures, loss of life, and lack of notable progress, and thoroughly dissatisfied with the Services' seemingly half-hearted attempts to act upon Congressional guidance to rectify the situation, the Senate Armed Services Committee (SASC) initiated a two-year long study of the Department of Defense, chaired by Sen. Goldwater (R-AZ). This study also included a top-down review of the nation's SOF capabilities.

Seeing their window of opportunity to make significant changes closing amid a rising tide of Congressional bad blood, DoD belatedly responded to the Secretary Weinberger's earlier tasking by creating the Joint Special Operations Agency (JSOA) in January 1984. However, like the RDJTF established before it, JSOA lacked both "operational and command authority over SOF units and was therefore unable to address any of the readiness, capabilities, and policy" ¹³ issues as the Secretary of Defense and Congress intended. This most recent paper tiger did not fool Congress, so the time for DoD-initiated reform had lapsed.

1985 -1987 – Congress Takes Charge

Congressman Daniel (D-VA) was convinced that the military establishment was not interested in special operations that the country's capability in this arena was second-rate, and that SOF operational command and control was an endemic problem. However successful and effective individual SOF units were, the potential for disasters in joint operations would remain if these conditions persisted. Senators Nunn (D-GA) and Cohen (R-ME) were equally convinced that DoD was not preparing adequately for future threats. To compound matters, they were further frustrated by the Services' repeated reallocation of monies specifically appropriated for SOF to non-SOF programs. Obviously, a clearer organizational focus and simplified chain of command for special operations was needed in order to conduct low-intensity conflict (LIC) and non-conventional missions.

In October 1985, the SASC completed its two year review and published its findings. This effort resulted in the Goldwater-Nichols Defense Reorganization Act of 1986. While Defense Secretary Weinberger had urged the Joint Chiefs to conduct more comprehensive strategic planning and increase their role in budget planning, he was not a supporter of this legislation. Indeed, many within the Defense establishment viewed the legislation as a direct threat and infringement of their authorities as service chiefs and unified commanders.

To correct the documented deficiencies of U.S. forces' ability to conduct joint special operations, "the concept to build a joint Special Operations command using all the training and

recruiting bases of the existing services' special operations organizations"¹⁴ was adopted. The Cohen-Nunn Amendment of the Goldwater-Nichols Defense Reorganization Act of 1986 was then codified in U.S. Code Title 10, section 167. The two pivotal items contained therein were the establishment of a senior level SOF proponent in the Office of the Assistant Secretary of Defense for Special Operations and Low-Intensity Conflict (ASD, SO/LIC) and the specific direction to integrate all service special forces in joint operations under a new command. This amendment also launched the only Unified Command required by law, the U.S. Special Operations Command.

Subsequent Congressional hearings and testimony revealed continued resistance within the services toward implementing the legislation. Accordingly, Congress enacted additional legislation forcing the Department of Defense to comply and integrate all service special operations capabilities into a joint team under the new command. Public Law 100-180 was enacted in December 1987 and directed the Secretary of Defense to provide appropriate resources to USSOCOM. The law also gave the Commander in Chief (CINC) of USSOCOM "head-of-agency" authority and established the Command's Inspector General. Head-of-agency authority specifically charges the CINC with the responsibility of developing and acquiring equipment and supplies intrinsic to special operations.¹⁵

For the first time Congress had mandated the President create a unified combatant command. Further, to finally guarantee their intentions were properly implemented, Congress legislated their way past DoD resistance. Overall, the legislation provided USSOCOM the resources and clout it needed to meet Congressional expectations. It had control over its own resources; it legally required inter-service coordination, unity of command under a single four-star, and a civilian proponent in the highest levels of the Defense Department in the Office of the Secretary of Defense.

Milestone events came quickly. In April 1987, President Reagan approved the establishment of USSOCOM and later that month the Command was activated. General Lindsay was easily approved by Congress as the first Commander in Chief (CINC) of USSOCOM; accordingly, the command's activation ceremony was held that June at the site of the command's new headquarters in Tampa, Florida.

While the Services moved to comply with the new legislation, the Marine Corps continued to get its house in order. Under Commandant General Al Gray, the Marines announced on 5 February 1988 that, in response to the current and projected realities of the world, they were changing "the designations of Marine Air-Ground Task Forces that constitute its fighting formations. The word 'amphibious' was replaced by 'expeditionary'. The new term signified that

the Marine Corps would not be limited to amphibious operations but rather be capable of a wide spectrum of deployment and employment options.”¹⁶ This particular act of foresight paid dividends for the Marine Corps in the next decade, during which service roles and missions once again came under Congressional scrutiny.

Meanwhile, Congress showed that it was not yet finished with special operations reform. In September 1988, additional legislation was passed to further support the fledgling special operations community. Public Law 100-456 mandated the following additional responsibilities to CINC, USSOCOM: Submit budget proposals to the Secretary of Defense for assigned special operations forces; manage and control funds for all special operations forces; ensure combat readiness of assigned special operations forces; and monitor the combat readiness of special operations forces while operational control is under another unified combatant commander.¹⁷

The law then assigned the following missions to USSOCOM: Conduct a special operations activity or mission under the command of the commander of the unified combatant command in whose geographic area the activity or mission is to be conducted, unless otherwise directed by the President or Secretary of Defense; exercise command of a selected special operations mission, if directed to do so by the President or Secretary of Defense.¹⁸ For the most part, these directions established USSOCOM as a supporting Command except in those instances as otherwise directed. Later, Secretary of Defense Rumsfeld gave USSOCOM the status of a supported Command as the DoD lead for prosecuting the Global War on Terror (GWOT).

As specified by law, USSOCOM now includes all special operations forces within the U.S. armed services. The Army, Navy, and Air Force complied, surrendering their so-designated units. The Army provided Special Forces, Delta Force, Rangers, specialized helicopter units, as well as psychological operations and civil affairs teams. The Navy supplied SEALs, special-boat units, and SEAL-delivery teams. The Air Force established helicopter and C-130 squadrons equipped for special-operations missions. Only the Marine Corps opted out. To understand why, we must begin with issues regarding the precise definition of “special forces.”

So Who Are the Special Forces?

In order to understand a key issue in the ensuing debate as to whether – or when- the Marine Corps should contribute forces to the Special Operations Command, it is important to describe precisely what kind of warriors and units reside within the special operations community. The main Marine argument, which was accepted by the special operations

community, was tied directly to the definitions of special forces, special operating forces, and general purpose forces. Linda Robinson, in "Masters of Chaos" explains the nuances:

There remains widespread confusion about basic terminology. The U.S. Army Special Forces (Airborne) (known by their distinctive headgear, the green beret).... are the largest component of the elite units known as special operating forces (SOF), which also include: Navy SEALs, U.S. Army Rangers, the Delta Force (formerly called Special Forces Operational Detachment-Delta), Air Force Special Operations pilots and combat controllers, the Army's 160th Special Operations Aviation Regiment; and Civil Affairs and Psychological Operations units. Proper usage frequently refers to all of these units as special forces, but the proper term is special operating forces. In (her) book Special Forces is synonymous with U.S. Army Special Forces (Green Berets).¹⁹

The Marine Corps Makes a Decision

Having initially embraced the spirit of the Defense Secretary Weinberger's guidance, the Marine Corps invested heavily in the maritime special purpose forces (MSPF) elements of their Marine Amphibious/Expeditionary Units. While some of the MEUs' missions "fall into the lower end of the special operations spectrum"²⁰ - such as embassy evacuations and recovery of downed pilots from hostile territory - the Marine Corps did not assign them to USSOCOM, contending that they were needed to perform the service's basic mission- project U.S. military power from the sea.²¹

As the defense reform legislation gained momentum, the Marine Corps rallied its forces. Interviewed in 2002, former Commandant General P.X. Kelley asserted that within the context of the Cold War, the Marine Corps' "role as a general-purpose force extended well beyond a singular focus on special operations."²² He insisted that the Marines' force reconnaissance companies were a critical human intelligence capability for the Marine air-ground task force (MAGTF) commander, a position that Congress upheld.

In the same series of interviews, both Mr. Locher, author of the legislation and a later ASD(SO/LIC) and Marine MajGen Punaro, a congressional staff member at the time, reinforced General Kelley's assessment and added the following:

...many in the Corps believed that a number of factors pointed to a strong likelihood of failure for the Special Operations Command: 1) Special operations forces mixed record of success; 2) Negative "baggage" from Vietnam; 3) The comparative importance of the low intensity and special operations missions with the major threats posed by Cold War adversaries and; 4) Office of the Secretary of Defense (OSD) reluctance to endorse the reform and the resulting potential to be under-resourced as a consequence of that reluctance.²³

The Marines' position raised no objections from the special operations community; in fact the only real interest they expressed was in the potential use of the Marines amphibious

platforms launches. This interest has remained given the increased force protection considerations and the greater potential for denied basing and staging rights in certain areas of the world.

The greatest benefit Marines at that time failed to foresee was the “substantial gap that would develop between SOF and the Marine Corps as a result of the equipment, recruiting, and training enhancements enabled through the establishment of Major Force Program Eleven (MFP-11), also known as the “SOF checkbook.”²⁴

1990 - 10 September 2001

The start of the decade inherited a number new political arrangements. The U.S. had a new President in G.H. W. Bush, Eastern Europe started its withdrawal from Soviet control, Chinese students demonstrated against their government in Tiananmen Square, and the Berlin Wall tumbled down. Meanwhile, back in Washington, the old debate concerning special forces composition resurfaced. A 1990 report to the U.S. Senate Armed Services Committee by the Government Accounting Office stated that all Marine Corps forces should be assigned to USSOCOM – an opinion with which the Department of Defense vehemently disagreed, offering a less drastic approach. The ASD (SO/LIC) thought the Marines should establish a component under USSOCOM. “After reviewing the Corps’ structure, future missions, and threats, and considering the pros and cons to this proposal, the Corps decided that our current arrangement with USSOCOM served both well, and that both organizations should continue to build upon the cooperative arrangements currently in place.”²⁵ The highly successful non-combatant evacuation operation (NEO), Operation Eastern Exit, provided an example of the current working relationship.²⁶

With the official dissolution of the Warsaw Pact in March 1991, the U.S. no longer had the Soviet military threat to defend against. The ensuing “peace dividend” led to some cuts in the defense budget as well as a reduction in military end strengths. The U.S. Armed Forces were reduced 19.4%, from 2.202 million in FY 1989 to 1.776 million in FY 1993.²⁷ Even without the Soviet threat, the military was still fully engaged. In the middle of these reductions, the nation went to war in Kuwait against Iraq in Operation Desert Shield/Desert Storm. Just prior to departing office, “Defense Secretary Cheney released a paper elaborating his strategic views for the 1990s in which he underscored the importance of strategic deterrence and defense, forward presence, and crisis response.”²⁸

Chairman of the Joint Chief of Staff General Shalikashvili likened this time to the post Vietnam era, when the United States and the world community were beset by new sets of challenges. His remarks to the Naval War College 1995 graduating class summed up his view:

For when in 1991 our strategy did succeed, the result was surprise and an absence of thinking and preparation for the very conditions and consequences we had struggled for so long to create. As we should have anticipated, the culmination of containment caused us a great deal of motion in a global environment that had been unused to much motion for many, many decades. An empire ended, the bipolar global order collapsed and more new nations were born -- and more borders changed -- than we witnessed even after the Second World War. Any one of these three events would shake the world. All three combined have been like putting an eggbeater into a pool of still water.

If we can create the stable regional security orders that I spoke of (emerging Asia and Latin America, stabilizing central and Eastern Europe, troubled Gulf) we will make the world much safer than it has been in our lifetimes. While the accomplishments of this century have been measured by wars won, yours will be measured in wars averted and nuclear stockpiles diminished.²⁹

To meet these challenges and to fulfill President Clinton's campaign pledges, Defense Secretary Aspin ordered a "bottom up review" of DoD. Released in September 1993, the report projected a reduced force structure still capable of fighting and winning two simultaneous major regional conflicts. It also proposed additional pre-positioned equipment and airlift/sealift capacity. Secretary Aspin, also sensitive to growing regional threats, advocated a strong military able to conduct limited operations, including peacekeeping, and maintaining a "strong peacetime presence around the world." He was also a big proponent of using NATO units in addition to U.S. troops in regional conflicts; he vigorously supported the U.S.-sponsored "Partnership for Peace" program to bring NATO members and non-members together for training maneuvers, equipment sharing, search and rescue, antiterrorist efforts, environmental cleanup, and peacekeeping operations.³⁰ Many of these missions were being planned, assigned, and executed by SOF and Marine Corps units.

In 1995, Congress, dissatisfied with Service efforts in changing their institutional habits to meet fiscal realities, instructed the Secretary of Defense to review the "arcane but central matter of service roles and missions.... [to] sort out existing accreted, cluttered, and often overlapping and duplicating service purposes."³¹ Congress appointed John White to chair the Commission on Roles and Missions of the Armed Services. According to the Washington Post, "the review inevitably zeroed in on chaos-checking 'expeditionary' operations. While the politicians have argued first whether to conduct them, the generals and admirals argued over who and how. According to John Dalton, 'the Navy endures as America's expeditionary force,' while Army

Secretary Togo West stated, 'Only the Army can provide rapid, decisive expeditionary forces.' Marine LtGen Charles Wilhelm begged to differ and laid the following claim: 'Expeditionary is the Marine Corps' middle name.'³² After all, the Marines had gone so far as to re-designate their amphibious units as expeditionary seven years prior, emphasizing their intent to perform a broader sweep of missions.

The Committee had no intentions of going down that rabbit hole however, and cast aside the old arguments (i.e., four air forces, two land armies). It recognized the context from which the Joint Chiefs of Staff Key West Agreement of 1948 had proceeded had changed considerably, so a new mindset was in order. Chairman White asserted in the report's Preface that "the emphasis must [now] be on molding DoD into a cohesive set of institutions that work toward a common purpose- effective unified command." Furthermore, "we need to ensure the right set of capabilities is identified, developed, and fielded to meet the needs of the unified commanders." To this end, the Report strongly recommended "enhancing joint structures that plan and perform missions."³³

The Marine Corps and Special Operations Command Dip Their Toes in the Water

Against this backdrop, the Marines and Special Operations Command continued building their relationship. "Senior officers from USSOCOM and Headquarters Marine Corps (HQMC) have conducted a semiannual Marine/SOF Board, based on a January 1993 agreement between the Commander in Chief, USSOCOM and the Commandant. This board deals with areas of concern for both the SOF community and the Marine Corps, particularly those operational areas requiring close integration of forces. The board also serves as a foundation for more informal coordination and professional military training between SOF and Marine forces in the field."³⁴ The Board was disestablished in 1996 until 2001, when a new USSOCOM/USMC Memorandum of Agreement (MOA) reestablished the board in January 2002. It has met annually ever since.

Following largely in Les Aspin's footsteps, his former Deputy William J. Perry adopted "preventive defense" as his fundamental national security policy in the post Cold War. The goals were: keep threats from emerging; deter those that actually emerged; and if prevention failed, defeat the threat with military force. To work, this strategy relied on threat reduction programs (reducing the nuclear complex of the former Soviet Union), counter-proliferation efforts, the NATO Partnership for Peace, expansion of the alliance, and maintenance of military forces and weapon systems ready to fight if necessary.³⁵ In October 2005, the Marine Corps stood up a 400-Marine unit dedicated to training foreign troops, a supplement to SOCOM's existing training

programs. By creating the Foreign Military Training Unit (FMTU) at Camp LeJeune, NC, the Marine Corps shifted their effort from an ad hoc supporting program to a permanent contributor. Independently but increasingly in cooperation, the Marine Corps and SOCOM continued to hone high value, low density skills, providing the forward presence required to maintain regional stability and situational awareness. The FMTU was transferred in February 2006 to SOCOM as part of the Marine Special Operations Command (MARSOC).

9/11 Changes Everything

Although drafted prior to the terrorist attacks of 11 September, the Quadrennial Defense Review Report of 30 September 2001 provided some significant direction for the services, especially for special operations forces. The following excerpts are particularly relevant: (1) transformation of U.S. forces, capabilities, and institutions are required to extend America's asymmetric advantages well into the future (p. iv); (2) new combinations of immediately employable forward stationed and deployed forces; globally available ...rapidly deployable, highly lethal and sustainable forces that may come from outside a theater of operations have the potential to be a significant force multiplier... (p. 25); (3) DoD will also recommend changes in the worldwide alignment of special operations forces assets to account for new regional emphases in the defense strategy (p.27); (4) synchronize deployments of U.S. forces and facilitate cross-Service trades for presence and deterrence (p. 35).³⁶

While the previous excerpts are not all-inclusive and are certainly open to interpretation, they show a continuity of thought and a foreword motion toward meeting the military requirements of the National Security Strategy (2002) in general and the policy articulated in the National Strategy for Combating Terrorism (2003). The Marine Corps has often been required to accomplish the mission specified missions and implied in these strategies. It remains "a force in readiness" capable of power projection and forced entry; they could deploy to developing countries throughout the world to provide training and mentoring foreign military units. Additionally, they have initiated changes to their force structure when needed.

In response to the terrorist attacks of 11 September 2001, the Marine Corps ordered the reactivation of the 4th Marine Expeditionary Brigade (4th MEB) as an anti-terrorism force in readiness. The 4th MEB (Anti-Terrorism (AT)) became operational on 29 October 2001 and was designed around an expeditionary MAGTF concept and tailored specifically to the Global War on Terror.³⁷

The unit performed missions steadily over the course of its four years until dissolved on the same day the Marine Corps Special Operation Command was activated, 24 February 2006.

The headquarters personnel fill billets in the new command, while most units, with the exception of the FMTU, remain intact and go to other commands. After all, “the Marine Corps operates within manpower limits...It’s a zero-sum process.”³⁸

An Accelerating Relationship

Secretary Rumsfeld, shortly following 9/11, directed Marine Commandant General Jones and USSOCOM Commander General Holland to explore ways to work more closely together. The issue of assigning a Marine Corps unit to USSOCOM was raised early in the discussions. After consulting with senior leaders of both organizations, the Commandant approved an initiative to establish a “purpose-built” unit for employment by SOCOM. This unit is later referred to as the “proof of concept” detachment. An October message further directed senior Marine leaders to “develop a plan to provide forces to the Special Operations Command on a permanent basis in order to cement the relationship of our two organizations at the institutional level and provide our nation with an expanded special operations capability.”³⁹

By November, the Commandant signed an MOA with General Holland. As a result “we expect to see a much closer working relationship with Special Operations Command...some of that has come from (lessons learned) in Afghanistan,” LtGen Emil Bedard, the Marine Corp’s Deputy Commandant for Plans, Policies, and Operations, told reporters.⁴⁰ According to General Jones, “The time is right to enhance interoperability between USSOCOM and the Marine Corps in order to prosecute the global war on terrorism and to meet future challenges.”⁴¹ The MOA was in large part an outgrowth of: (1) the close cooperation developed between the Marine Corps and SOCOM in the political and budgetary fight to save the threatened V-22 Osprey tilt-rotor aircraft program; and (2) the joint combat missions the two elite organizations teamed up for in Afghanistan.⁴² Gen. Franks used the Marines much as he has the small squads of Special Operations forces -- for quick reconnaissance and raids.⁴³

The MOA re-established the USSOCOM/USMC Board, which focused on how the two organizations might do more together in support of short- and long-term goals of the emerging relationship to include “imbedding SOCOM representatives with deploying Marine Expeditionary Units to act as liaisons to deployed SOCOM units.”⁴⁴ A follow-on meeting in March discussed a possible USMC contribution to SOCOM. Representatives from the Naval Special Warfare Command (NSWC), USSOCOM, and the USMC were in attendance. The NSWC was given the lead on this matter and would continue discussions with the Marines.⁴⁵

2002 brought other coordinated and cooperative events: the first Marine general officer was assigned to special operations as Brig Gen Hejlik was named SOCOM Chief of Staff. Four

years later would see [now] Major General Hejlik as the MARSOC's first Commanding General. In the field, Marines from the U.S. European Command (USEUCOM), in Stuttgart, GE, began replacing Green Berets in the former Soviet republic of Georgia, where they were training Georgian forces to defend against infiltration by Islamic rebels from Chechnya.⁴⁶

USSOCOM/USMC Board #2 was held in October 2002 and explored the following items: future concepts, research & development, intelligence, communications and logistics interoperability; reinvigoration of Theater SOC and Amphibious Readiness Group/MEU interaction. Members continued to define a USMC force contribution to SOCOM (proposed detachment) with USSOCOM; they identified specific requirements for USMC support with the intention of allowing USSOCOM to focus more effectively on the GWOT as the supported command. The principal effort between this and the next board would focus on solidifying the training relationships between SOF and Marine units.⁴⁷

For example, SOF and interagency participation in the Marine Corps' exercise series Expeditionary Warrior (EW). The scenarios in EW were largely shaped by events surrounding the U.S. war on terrorism. Most notably, said Frank Jordan, Director of Wargaming at Marine Corps Warfighting Lab, is the emphasis on how the Marine Corps and SOCOM can "develop a closer relationship." Marine Maj Joel Sauer, an operations officer at the MCWL, said that a war game such as Expeditionary Warrior provided the first step in the process of figuring out what changes may be needed in the force makeup and organization. "It's an efficient way to discover the deficiencies in a particular unit," Sauer told National Defense. "You don't have to put forces in the field, spend millions of dollars to figure out that you need to reorganize a unit, or that you need a certain new tool."⁴⁸

Changes in Organizational Attitudes (Senior Leadership)

"Over the past year [2002], the Marines have moved to relieve some of the burden on overtaxed Army and Navy Special Operations forces by offering to take on more commando tasks (Afghanistan and Horn of Africa), overcoming past resistance to assigning Marines to the Special Operations Command.... In a series of interviews ahead of his departure as the Marine Corps Commandant, Gen Jones has called attention to the trend, arguing that for the service to survive, it must make itself useful to regional commanders in combating terrorists and other operations."⁴⁹ As reported in Bradley Graham's Washington Post article:

As the smallest of the nation's military service, the Marines have often found change not only easier to come by but politically necessary...."For the foreseeable future, there's a requirement for more Special Operations like forces," Jones said. "My argument is, if you already have a fair amount of those (in the Marines), don't reinvent the wheel, use what you already have."

The Marine Corps has made organizational changes to improve its ability to conduct special operations missions. In an era of repeated and protracted regional conflicts, certain skill sets are back in demand. The Marine Corps reconnaissance and fire support communities have been rejuvenated. Marine Division and Force Reconnaissance structure has been augmented with personnel and added rank structure. Force reconnaissance, in the case of II Marine Expeditionary Force (MEF), was reassigned to the direct control of the MEF Commander. Additionally, enlisted Marines were allowed to stay in the occupational field past the rank of SSGT (E-6), thereby retaining experience and knowledge base inside the field.

Within the fire support community, the air-naval gunfire liaison (ANGLICO) will return to active duty after having been relegated to the Reserve force since 1997. ANGLICO personnel provide fire support for allied units and routinely support Marine reconnaissance and Army SF, requiring them to have the same level training, including parachute, survival, pathfinder, and helicopter rope-suspension schools.

The USMC and the USAF are both acquiring the V-22 Osprey tilt-rotor aircraft. When the Osprey has completed its flight testing, both Marine and Air Force pilots and maintainers will train with the V-22 squadron at MCAS New River, NC. According to Commandant General Hagee, "The jointness that will occur at this training squadron will go a long way towards promoting closer understanding and coordination between MC and USAFSOC aviation units."⁵⁰

General Jones stated his approval for the creation of a special operations unit stems from an earlier decision to make force reconnaissance a career military occupational specialty (MOS) for Marines. "That gives you ... [a] higher-end specialty that becomes attractive to Special Operations Command."⁵¹ Jay Ferrar, a national analyst at the Center for Strategic and International Studies, claimed the proposed integration of Marine units with SOCOM would benefit both organizations. "They [the Marines] can take advantage of the cutting-edge training ideas the Special Ops Command is always discovering," said Ferrar, a retired Marine officer. "And SOCOM can take advantage of what the Marines are doing in small-unit operations."⁵²

During the January 2003 Combatant Commanders Conference, General Hagee discussed the concept of establishing a "dotted line" relationship between the Theater SOC and the Amphibious Ready Group (ARG)/MEU(SOC). Further dialogue in February resulted in agreements between Commander, US European Command (CDRUSEUCOM), Commander, US Naval Forces Europe (COMUSNAVEUR), Commander, Marine Forces Europe (COMMARFOREUR), and Commander, Special Operations Europe (COMSOCEUR) to develop an MOA that defines this relationship as a Coordinating Authority - in other words, a consultative relationship providing a line of communication applicable for planning and similar activities. The

overall objective of the MOA is to create a habitual ARG/MEU (SOC)-SOCEUR relationship based on common understanding and shared knowledge of selected tactics, techniques, and procedures. The MOA would be reviewed annually and may remain in effect, be modified, or rescinded upon mutual agreement of the signatories.⁵³

Marine Corps Special Operations Detachment – Out for a Test Drive

For the first time in their joint history, the Marine Corps was willing to contribute a force to USSOCOM and SOCOM was willing to accept it. Granted this was a temporary condition. *The Memorandum of Agreement (MOA) between USSOCOM and USMC Regarding the Initial Marine Corps Force Contribution to the USSOCOM* was signed on 20 Feb 2003 and established “an initial Marine Corps Force Contribution to USSOCOM and the conditions under which the USMC will provide, and the USSOCOM will employ, the Marine Corps’ initial contribution of forces, hereinafter referred to as the USMC/USSOCOM Detachment (MCSOCOM Det). The MCSOCOM Det will be employed in such a manner as to fully evaluate the MCSOCOM Det and its potential value to USSOCOM.” Furthermore, “the MCSOCOM Det augments a deploying Naval Special Warfare (NSW) squadron’s capability to conduct special reconnaissance, direct action, coalition support, limited foreign internal defense, and other missions as required in support of joint and fleet commanders in order to test the Initial Marine Corps Force Contribution to the USSOCOM.”⁵⁴ The approximately 100 man detachment would deploy in support of Operation Iraqi Freedom.

According to Marine Corps Bulletin 5400 of 4 December 2002, the Commandant would then make a final decision concerning the permanent establishment of a Marine Force based on the results of the test and a detailed analysis of all related doctrine, organization, training, materiel, leadership and education, personnel, and facilities (DOTMLPF) issues.

Both the Marine Corps and USSOCOM conducted a post-deployment analysis. The Center for Naval Analysis (CNA) prepared *MCSOCOM DET: Analysis of Service Cost and Considerations*. The Joint Special Operations University (JSOU) drafted, *MCSOCOM Proof of Concept Deployment Evaluation Report*. To enable the Commandant to make a determination regarding a permanent Marine force contribution, the CNA report carefully scrutinized various personnel combinations and related fiscal factors. It considered the deployment a success, but stipulated that a Marine force could not expect to operate completely on its own when supporting SOF forces.

Interestingly, the JSOU report established up front that “since USSOCOM does not have a stated warfighting requirement specifically identifying the need for a USMC contribution, the

Proof of Concept Deployment represented a 'self-generated' requirement....without a validated requirement it was difficult to measure the merit of a contributed force against any defensible criteria.⁵⁵ Apparently they were unaware of Secretary Rumsfeld's interest in this eventuality. In the end, they also concluded that the Marine Corps successfully demonstrated its ability to interoperate with SOF during combat missions.

The Secretary of Defense Will Not be Ignored

"The premise of a USSOCOM Marine component is a concept that has met resistance in the past. According to the Goldwater-Nichols Act of 1986, special operations forces listed as 'core' or 'augmenting forces' in the 1985 Joint Strategic Capabilities Plan were to be assigned to USSOCOM. To date, the Corps has not been required to assign forces to USSOCOM, and the Secretary of Defense has exercised his discretionary authority to exclude assignment of Marine forces to USSOCOM."⁵⁶ However, Secretary of Defense Rumsfeld clearly had other ideas. In a Pentagon news conference he laid out his agenda:

Today we are taking a number of steps to strengthen the U.S. Special Operations Command so it can make even greater contributions to the global war on terror. In the 2004 budget we are requesting an increase in SOCOM's budgets to pay for equipment losses, additional equipment and additional forces. Special Operations Command will function as both a supported and a supporting command. By organizing SOCOM HQ at Tampa as well as at smaller theater Specops commands in regional theaters, SOCOM will have the tools it will need to plan and execute mission in support of the GWOT. This expanded operational role will be in addition to its current role as a supported command. To (further) assist it in its expanded mission, over time, the SOCOM will be divested of various missions, such as routine foreign military training and civil support, which can be successfully accomplished by other forces or agencies. The global nature of the enemy and the need for fast, efficient operations in hunting and rooting out terrorist networks around the world have all contributed for an expanded role for the specops forces. We are transforming that command to meet that need.⁵⁷

In short, the Pentagon's senior leadership wants more special operations forces. Jones explained, "So we are looking for ways to use Marine forces to go into what were previously SOF missions that we can do and were trained to do. There are 'some cultural differences to overcome' as well as certain institutional ties and confidence-building measures that we will have [to deal with]. "But," he quickly added, "I think it is going to happen and I think it is going to be very capable and very good."⁵⁸

Defense Secretary Donald H. Rumsfeld told reporters that the Marine Corps will be expected to develop a closer relationship with the special operations forces. Under increasing pressure to deliver, General Hagee proposed increasing the number of Marine officer billets at

SOCOM, and expressed a willingness to assign specialized units as needed, an arrangement welcomed by Brown. Hagee has also stated his intention to increase the capabilities of the Corps to perform counterinsurgency operations, which would reinforce the SOCOM mission without relinquishing control of Marine assets. It was reported that Secretary Rumsfeld had viewed this proposal, as he had earlier proposals, as insufficient.

The Secretary of Defense "has told all involved to go back and work it until they come up with a suitable sized Marine Corps contribution," said a Marine special operations officer close to the program. "I don't think we or SOCOM will have much say in this." Rumsfeld designated SOCOM, which is largely comprised of Army units, as the lead joint command for planning the ongoing war. The resulting strain on those Army units, and the increasing need for additional special operations forces, are cited as the reasons he wants to push the Corps into the SOCOM fold.⁶⁹

Finally on October 28, 2005, following almost two years of negotiations, General Hagee, and SOCOM Commander General Brown finally arrived at a solution acceptable to Secretary Rumsfeld. The details were very closely held until the official announcement was made a few days later.

Introducing the Marine Corps Special Operations Command (MARSOC)

On 1 November 2005, after nearly twenty years of debate, exercise, experimentation, and an increasing spirit of cooperation, "the Secretary of Defense approved a joint recommendation by U.S. Special Operations Command and the Marine Corps to create a Marine special operations command as a component of USSOCOM. The Marine Special Operations Command will enhance Marine Corps and USSOCOM interoperability and provide USSOCOM greater flexibility and increased capability to fight the war on terrorism. The MARSOC will be organized in three subordinate elements. – The Marine Special Operations Regiment (MSOR), the Foreign Military Training Unit (FMTU), and the Marine Special Operations Support Group (MSOG) – with an authorized strength of approximately 2,600 Marines. MARSOC headquarters, the FMTU, and the MSOG will be stationed at Camp LeJeune North Carolina. MSOG headquarters will also be at Camp LeJeune with an additional element stationed at Camp Pendleton, California."⁶⁰

With the announcement and the activation ceremony on 24 February at Camp LeJeune, North Carolina, a chapter in Special operations and Marine Corps history was closed while another opened. No strangers to each other, the two communities have fought together in all the nation's wars in one way or another. "In many respects, special operations are nothing new for the Marine Corps, which has been the expeditionary force for the United States since its

inception in 1775," said retired Special Forces Colonel and former Marine, Al DeProspero. Changes necessitated by the GWOT "merely mark a realization that the Marine Corps has a definitive role to play in low-intensity conflict and special operations."⁶¹

Senior Marine leaders acknowledge that while Secretary Rumsfeld had indeed pushed their service into setting aside the Corps' traditional 'sense of separateness', they realized the new arrangement would provide a bigger role for Marines in the Global War on Terror. LtGen Huly, Deputy Commandant for Plans Policies and Operations, sums up the Marine Corps' sentiment;

We finally came to the realization that unless we were a full partner in U.S. Special Operations Command, we probably weren't making maximum use of the Marine Corps' capability. He added that Rumsfeld's interest in the issue had certainly brought us along.⁶²

Vice Admiral Eric Olson, Deputy Commander of SOCOM, commented, "The decision that was made [last week] was a bold decision, but it's a good and important decision made at the right time in history."⁶³

The decision to create a Marine Component occurred after nearly two decades of increasing cooperation and coordination between the Marine Corps and the special operations community. Although both had adjusted well to the significant changes in world order and the subsequent reprioritization of national security objectives, it appears that even with the cataclysmic event of 9/11, neither was inclined to formalize their arrangement by creating a permanent Marine Component to SOCOM. They managed to resist this last step despite the increasingly heavy burden placed on special operations in prosecuting the 'long war' and the mounting pressure from the Pentagon to do so. In fact, the energy they placed into planning and executing the multiple, self-generated, initiatives listed within this report illustrates how far they would go to do everything short of creating a MARSOC. There is little in public information to suggest that USSOCOM would have unilaterally moved to force the issue. Therefore, it is doubtful that without third party intervention (OSD), the Marine Corps would have never fully committed, on a permanent basis, a Marine Component to SOCOM.

Rumsfeld has made no secret of his frustration at how long it has taken to negotiate the entry of the Marines into SOCOM. After a visit to SOCOM headquarters on Oct. 11, he said talks had gone 'painfully' slowly. "Forever, it's taken," he told troops at McDill Air Force Base in Tampa. "I'll be 85 before it's finished, I'm afraid." Left to their own devices, the two elite parties may have continued their intertwined co-existence. The Marine Corps had hoped to avoid giving up control of its Marines, especially those in its more specialized units, but SOCOM pressed for command. "Is everyone in agreement that this is a good idea?" According to U.S. Army Major

Swiergosz, a Defense Department spokesman, "Secretary Rumsfeld thinks it is, so everyone else does too." Is there a piece of paper that actually says this is how we're going to operate and do business? Not yet."⁶⁴

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wave returned to the USS Guam. The ships turned north for Muscat, Oman, with 281 evacuees, including eight ambassadors, 61 Americans, and 39 Soviets. The entire expedition lasted less than 10 days. From the launch of the CH-53Es to the return of the last CH-46s, the evacuation itself had lasted less than 24 hours. On 11 January, the USS Guam and USS Trenton offloaded the evacuees in Muscat, including an infant born aboard ship, bringing the operation to a successful conclusion. More information on this topic may be found in: U.S. Marine Corps, "Expeditionary Operations," Doctrinal Publication (MCDP 3), (Arlington: HQMC, 16 April 1998), 112-115.

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